Michigan
State Supplemental Guide

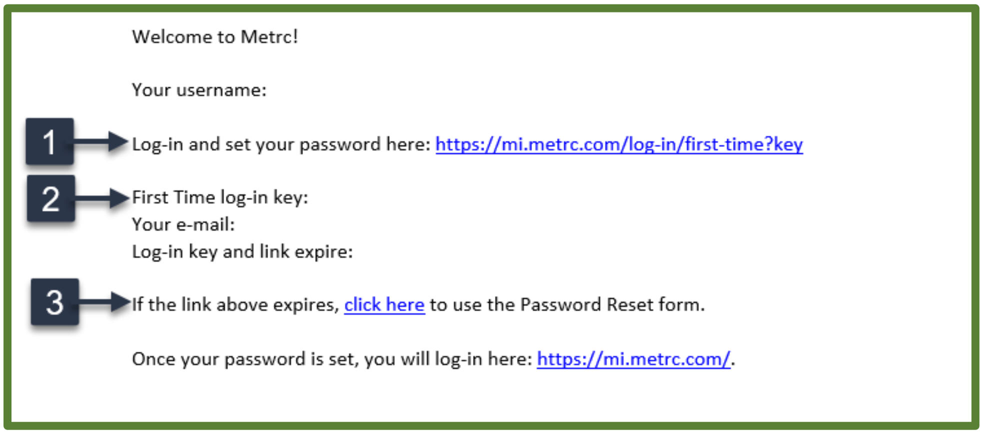
A Supplemental Guide to the Metrc Industry User Guide, Revision 23.2

This manual includes the most current updates to the Metrc software. As such, this supersedes any previous versions and nullifies all prior, potentially out-of-date content.

Table of Contents

First-Time Credentialing

At least one business owner and/or key administrator must complete the New Business Metrc Training to qualify for credentials and become a Metrc Administrator for a facility. Registration for a Metrc Learn account is required to take all Metrc Training. After completing the New Business Metrc Training, users will be tested. After testing, users are prompted to request credentials. Metrc verifies the user's credentials and training, then issues credentials to the Key Administrator within 72 hours.


Welcome to Metrc!

Your username:

1 Log-in and set your password here: https://mi.metrc.com/log-in/first-time?key

2 First Time log-in key:
Your e-mail:
Log-in key and link expire:

3 If the link above expires, click here to use the Password Reset form.

Once your password is set, you will log-in here: https://mi.metrc.com/.

Figure 1: Welcome Email

This email contains the Log-in Link and a temporary password to access Metrc and set up the user's account as shown in **Figure 1**. The First-Time Log-in Key is valid for 72 hours; the user must log in within 72 hours of when the link was sent.

Item 1: Log-in Link

https://mi.metrc.com/log-in/first-time

This link will take the user to the first-time log-in page, where the user can use the key and temporary password to log in.

Item 2: First-Time Log-in Key

This first-time log-in key can only be used one time within 72 hours of when the Welcome to Metrc email is sent.

Item 3: Site Link

https://mi.metrc.com

Use this link to navigate to the main log-in page and create a bookmark on the user's device.

Licenses And Permissions

Key Administrators automatically have access to all areas for their license types. They will assign specific permissions to employees as they are added to the account. If an employee does not have permission to an area, it will not appear on the navigational toolbar. The Key Administrator must add all owners with full permission in **Figure 2**.

	Cultivation	Processor	Provisioning Center	Safety Compliance	Secure Transporter	Microbusiness
Plants	✓					
Packages	✓	✓	✓	✓	✓	✓
Transfers	✓	✓	✓	✓	✓	✓
Sales			✓			
Admin	✓	✓	✓	✓	✓	✓
Patients			✓			
Reports	✓	✓	✓	✓	✓	✓
Finacials	✓	✓	✓	✓	✓	✓
Search	✓	✓	✓	✓	✓	✓

Figure 2: License Permissions

Cultivation

Options available on the navigational toolbar for Cultivation include Plants, Packages, Transfers, Admin, Reports, Financials, and Search.

Processor

Options available on the navigational toolbar for a Processor include Packages, Transfers, Admin, Reports, Financials, and Search.

Provisioning Center

Options available on the navigational toolbar for a Provisioning Center include Packages, Transfers, Sales, Admin, Patients, Reports, Financials, and Search.

Safety Compliance

Options available on the navigational toolbar for Safety Compliance Facilities include Packages, Transfers, Admin, Reports, Financials, and Search.

Secure Transporter

Options available on the navigational toolbar for Transporters include Packages, Transfers, Admin, Reports, Financials, and Search.

Microbusiness

Options available on the navigational toolbar for Microbusinesses include Packages, Transfers, Admin, Reports, Financials, and Search.

Initial Account Setup

Below are the best process steps for setting up the organization's Metrc account.

Facility Step-by-Step Process

1. Receive Metrc Administrator credentials.
2. Add Facilities/Locations.
3. Select the Facility/Location where the data will be entered.
4. Under Admin on the navigational toolbar, add the following:
    a. Tag Orders: Tags must be ordered for each individual license.
    b. Locations: Locations describe where the physical product is located. Locations may be added to multiple license types at one time if there will be multiple facilities with identical location names.
    c. Strains: Strains may be added to multiple license types at one time if there will be multiple facilities with identical strain names.
    d. Items: Items must be entered in each individual license.
    e. Transporters: Transporters must be entered for each individual license.
    f. Employees: Employees may be added to multiple facilities at one time across multiple license types.
5. When the plant and/or package tags arrive, receive tags digitally in Metrc from the Tag Orders page.
6. Add payment information for Industry Support fees under Financials on the navigational toolbar.

Tag Orders

While ordering tags in Metrc is a straightforward process, it is important to pay close attention and verify the information before placing an order. After a tag order has been submitted, it can only be canceled by calling the Support Line before 9:00 P.M. Eastern on the day the order was placed. Metrc tags are custom printed for each facility; as such, orders cannot be canceled after the printing process has begun and are non-refundable/non-returnable. Pay close attention to the facility that the tags are being placed from/for, the number of tags, and the type of tags being ordered. Always double-check the information before selecting the Place Order button. See **Figure 3** for the New Tag Order action window.

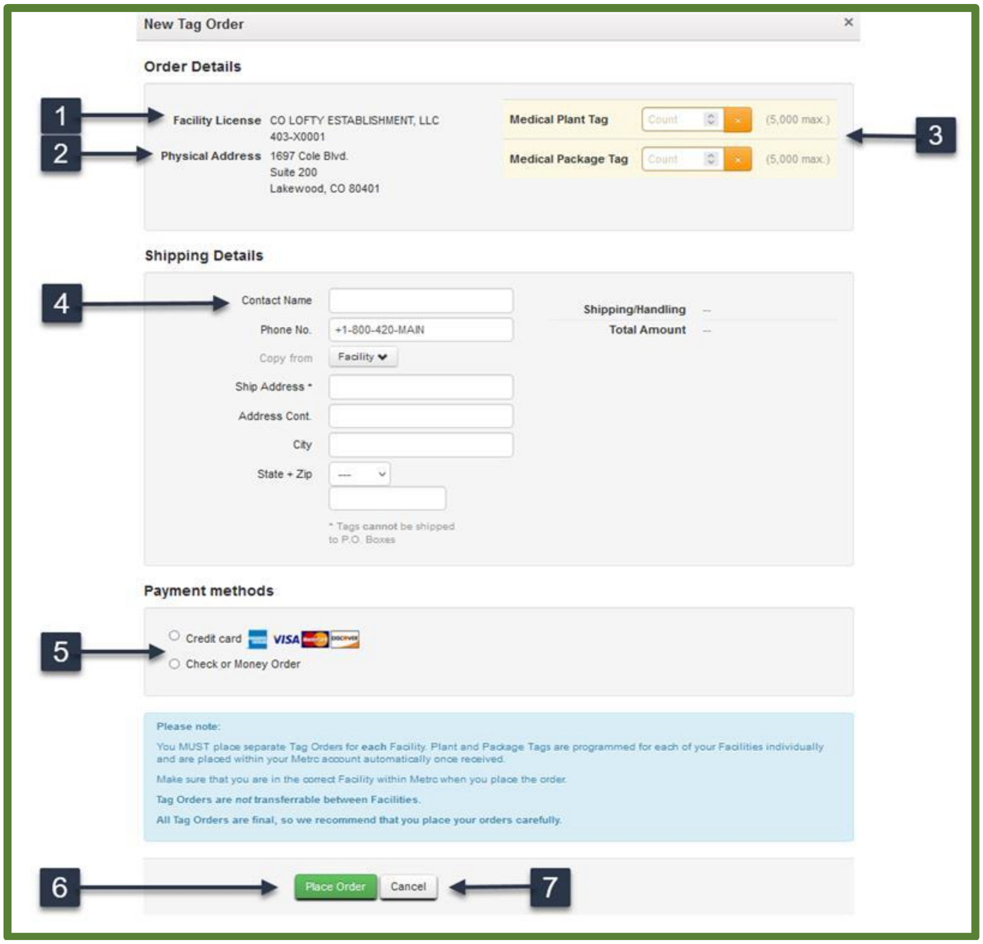


Figure 3: Order And Shipment Details Entry

Item 1: Facility License #

The Facility License number will be auto-populated based on the facility that is currently being worked in.

Item 2: Physical Address

The Physical Address of the facility is automatically populated with the facility address on file with the state.

Item 3: Plant and/or Package Tag Amount

Enter the number of Plant Tags needing to be ordered (Cultivations only) and/or the number of Package Tags needing to be ordered.

Item 4: Shipping Details

Enter the preferred shipping address.

Item 5: Payment Methods

Select which payment method is being used, either credit card, check, or money order.

Item 6: Place Order

Click the Place Order button after verifying the information is correct to submit the order.

Item 7: Cancel

Click the cancel button to exit without saving any data.

Notes:

- To navigate to Tag Orde, select Admin on the navigational toolbar and then click Tag Orders.
- Tags can be ordered via credit/debit card, check, or money order.
- Payment information is not required to be the licensee or the business owner.
- Tags can be sent to a physical location but may not be sent to a PO Box.
- Tags will be sent by UPS ground.
- Tag costs are $0.45 per plant tag and strap and $0.25 per package tag.
- To request and arrange payment for expedited shipping, call Metrc Support as soon as possible after placing the tag order.

Item Categories

When adding Items into Metrc, keep in mind:

- The Item name must identify the product that will be packaged and eventually distributed to Patients or Consumers.
- The Item name must not simply identify the Category; it must describe the specific item that will be packaged from a Harvest or Production Batch. The name for an item from any Strain Specific category must include the Strain Name (e.g., Buds - Blue Dream).
- Items must be populated for each individual facility.
- When creating an Item, identify the Category to which it belongs. Categories available in the menu are populated by the state. Categories facilitate the tracking of products in the system by like groups.
- The facility packaging the product names the Item; the Item name carries with the product through the distribution chain. It is unlikely that a Provisioning Center would ever change the name of an Item, even if/when repackaging the product.
- After Items are created in the Items admin area, they will be available in the Items menu as the facility creates packages.

Item Categories are defined by the state and are listed below with requirements (the state may change, add, or remove Item Categories in the future). See **Figure 4** for Item Categories.

Item Category	Volume, Weight, or Count-Based?	Strain Required?
Buds	Weight	Yes
Buds (prepackaged)	Count	Yes
Concentrate	Weight	No
Concentrate (Each)	Count	No
CRA Selected Sample	Weight	No
Gas	Weight	No
HEMP - Concentrate	Weight	No
Hemp CBD Concentrate	Weight	No
Immature Plants	Count	Yes
Infused Liquid	Volume	No
Infused Liquid (each)	Count	No
Infused Non-Edible Liquid	Count	No
Infused Non-Edible Solid	Count	No
Infused-Edible	Count	No
Inhalable Compound Concentrate	Weight	No
Inhalable Compound Concentrate (each)	Count	No
Kief	Weight	No
Seeds	Count	Yes
Shake/Trim	Weight	No
Shake/Trim (by Strain)	Weight	Yes
Shake / Trim (prepackaged)	Count	No
Vape Cart	Count	No
Wet Whole Plants	Weight	Yes

Figure 4: Item Categories

Plants

- A plant’s destruction can be recorded anytime during the growth phases.
- Plants must be tagged when they reach a height of 8 inches.
- Anytime something is trimmed off a vegetative or flowering plant with the intent to sell or process trimmed material, create a Manicure Batch. Manicure Batches must be strain specific.
- Use the Change Growth Phase button to transition plants from one phase to another.
- Harvest Steps:
    1. Must Harvest strain specific.
    2. Weigh each plant individually in its entirety after cutting it from the root ball (weight must include stem, stalk, bud/flower, fan leaves, trim leaves, etc.).
    3. Waste can be collected and entered multiple times based on the businesses operating procedures but must be reported in the system the day it is collected and assigned to the specific harvest from which it came. Waste can be discontinued if it was done in error by selecting the X to the far right of the harvest batch.
    4. Create Test Samples directly from the packages created from each strain-specific harvest batch.
    5. Package product strain specifically from the Harvest Batch (Item-specific packages).
    6. Create a Transfer Manifest to move products to Processors and/or Provisioning Centers.
    7. When the product from a Harvest Batch is completely gone, digitally Finish the Harvest Batch regardless of the remaining weight in the system. At the point at which all physical material is gone, that remaining weight is indicative of moisture loss.
- Plant tags are for one-time use. After a plant is destroyed or harvested, the associated tag must be destroyed or kept separate for record-keeping.

Packages

- An Immature Plant or Seeds can be packaged strain specifically from the Immature plant's menu and transferred for sale.
- To create an intermediate product, like a Production Batch of Concentrate, pull from a package of raw products to create a new package for the new Concentrate. The product will be pulled out of that Production Batch to create additional Production Batches (e.g., infused edible products). Each new Production Batch will have a new Package Tag and be marked as a Production Batch. If these Production Batches are final products, packages will be created from them for transfer to the Provisioning Center.
- A package must exist to be selected for transfer. Transfers are real-time inventory dependent.
- There must be a contents section identifying the source harvest or packages for each new package created.
- Click the most appropriate adjustment reason on the menu when adjusting a package.
- To send a sample for testing from a package, each harvest will have strain specific lot packages created. Test packages will be made directly from those strain specific lot packages.
- Package tags may only be used:
    - One time
    - For the product they were originally created to hold
- A package can be discontinued if it has not been transferred, used to make another package, or sold. In that case, it cannot be discontinued.
- A package can be finished if the package is at zero, there is no more product in it, and it is not on hold by the state.
- A finished package can be unfinished, but a discontinued package cannot.

Package Adjustment Reasons

The current Adjustment Reasons, as populated by the state, are:

Drying

Five to seven grams of moisture loss/drying per pound.

Entry Error

This adjustment reason can be used if a mistake has been made or did not calculate pulling packages correctly. This must not be used for correcting sales.

Internal Product Testing Samples

Product that is tested internally via Quality Assurance or in-house testing.

License to License Transfer

Product sent to wrong license number.

R&D

Products that are being tested for research and development purposes. All research and development testing is done prior to all state-required full panel testing.

Scale Variance

Used to account for variance between scales at the shipping and receiving facilities (must be no more than 0.9 grams per pound)

Spoilage

Used when Edibles/Non-edibles have passed their expiration or when the product spoils and must be destroyed.

Theft

Used for any type of theft (licensee must also notify the state and file documentation with Metrc)

Trade Sample

Product that is sent to another licensee in hopes that the receiving licensee will purchase that product in the future.

Waste

Includes bud, shake/trim, pre-rolls, concentrate, recalls (a product must be destroyed), state-mandated destruction.

Transfers

- A transfer manifest must be created to move packages from one license to another.
- To produce a physical manifest to print and send with the driver, select the manifest number to highlight the item in orange, then click the View Manifest button. The manifest will open as a PDF in a new window to print.
- A package must be received in its entirety; a partial package cannot be received (i.e., 200/400 grams of raw product).
- One or more packages can be rejected from a manifest; or a manifest can be rejected in its entirety.
- If a package that has been sent is rejected by the recipient, the receiving facility will need to navigate to the Rejected tab in the Transfers area menu on the navigational toolbar to receive the item or items back into the license business' active inventory after they are physically back on site.
- A package must exist to be selected for transfer; transfers are real-time inventory dependent.
- When receiving a manifest digitally, always physically verify the count/weight of each package. Be sure to account for discrepancies by modifying the received count/weight. Consider rejecting the package if a substantial discrepancy exists between the reported shipped amount versus the amount being received. A modified count/weight on the receiving end will raise an exception in the state reporting.
- A Transfer must be digitally received in the system the same day of physically receiving the product.
- Reject any suspicious or incorrect transfers.

Transfer Types

AU Affiliated Transfer

Used when manifesting to an adult-use (AU) facility affiliated (under the same ownership)

AU Seed and Seedlings

Used to bring in seeds and seedlings from an outside source by cultivation that is approved to do so.

Caregiver

Used for external transfers coming in from caregivers donating products to a licensed facility that is allowed by the state rules and regulations.

Educational Research License Transfer

Used for transfers to an educational research license facility.

External Cannabinoids

Used for external transfers of Cannabinoids being received from an outside source into a licensed facility.

Grow to Grow between Med and AU

Used for transfers being done from cultivation to cultivation between medical and AU licenses.

Hemp CBD R&D Conversion Transfer

Used from external transfers of hemp CBD being brought from an outside source into a licensed facility.

Immature Plants Between Med and AU

Used for transfers of immature plants between medical and AU licenses.

Infusion Transfer

Used when manifesting to a Processing License to process material for the facility or store.

Med Affiliated Transfer

Used for transfers between medical licenses that are affiliated or associated with each other.

Microbusiness Transfer

Used for transfers from one license to another, including medical and AU cultivations, as long as the license is allowed to do micro business transfers.

PC and Retailer between Med and AU

Used for transfers between Provisioning Centers and Retailers transferring products from the medical side to the AU side.

Processor to Processor between Med and AU

Used for transfers between a medical processor to an AU processor for transferring products from the medical license to the AU license.

Return to Sender/Shipper

Used for transfers where the product is being returned to the sender or originating licensed facility that sent it.

Temporary Event

Used to externally transfer products out to a state-approved event from a licensed facility.

Temporary Event – Return

Used to externally return products from a state-approved event to a licensed facility.

Testing Transfer (to SCF)

Used when sending Test Samples to a Testing facility.

Trade Sample Transfer

Used for transfers of trade samples from one licensed facility to another.

Wholesale

Used when sending to an unaffiliated license, and money is being exchanged for the products.

Transfers Hub

The Hub grid is located under the Transfers area menu on the navigational toolbar as shown in **Figure 5**. After a transfer is registered, both the transporter and destination licensees can see the transfer information entered. The designated transporter can edit certain details in the manifest from the Transfers Hub, while the destination licensee can view all information on the manifest.

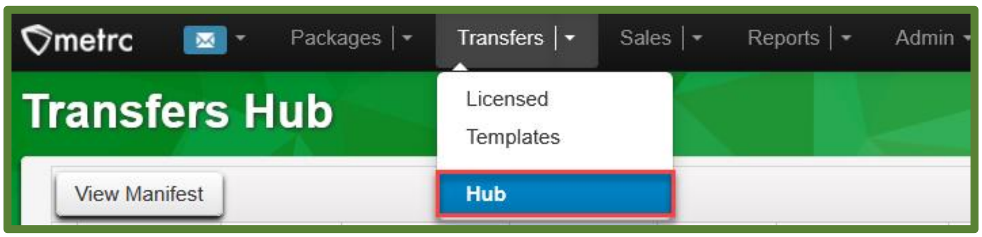


Figure 5: Transfers Hub

Metrc does not enforce all buttons outlined for transporters to report their actions. Meaning if a transporter does not select any button during their route or layover and the manifest is received by the destination facility, then these options would no longer be selectable by the transporter.

After Hub is selected, the user will have selectable buttons as seen in **Figure 6**. These buttons are treated as reportable actions a transporting licensee makes with each transfer. The buttons are applied in chronological order. For example, if Arrive is selected prior to Depart, the Depart button will no longer be visible. In addition, no date/time would be recorded for Depart.

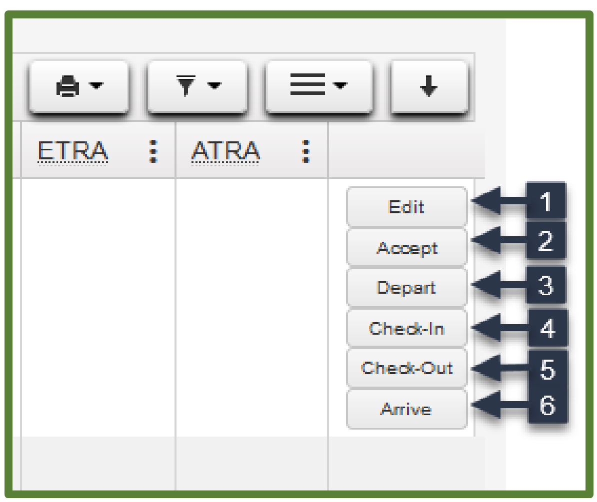


Figure 6: Transfer Status Buttons

Item 1: Edit

The Edit button allows for a transporter to update Estimate Departure and Arrival times as well as Driver and Vehicle information.

Item 2: Accept

The Accept button is used when a transporter accepts custody of the rejected packages. And then departs the original destination facility.

Item 3: Depart

The Depart button is used when a transporter accepts custody of the rejected packages and then departs from the original destination facility.

Item 4: Check-In

The Check-In button is only used when a layover is selected, and that transfer will be stored at a transporter's facility for any period. Click Check-In to indicate that the transporter has arrived at their layover facility.

Item 5: Check-Out

The Check-Out button is only applicable when a layover is selected, and that transfer will be stored at a transporter's facility for any period and will select Check-Out when they are leaving the layover facility to continue the planned route.

Item 6: Arrive

Select the Arrive button to indicate the transporter arrived at the originating shipping facility with the rejected package.

Transfers Hub: Direction

Licensees with access to the Transfers Hub grid in Metrc will have icons that will identify the point of delivery for each transfer in the column heading Direction. It will indicate the direction (Outbound or Return) in which the designated transporter license is going as shown in **Figure 7**.

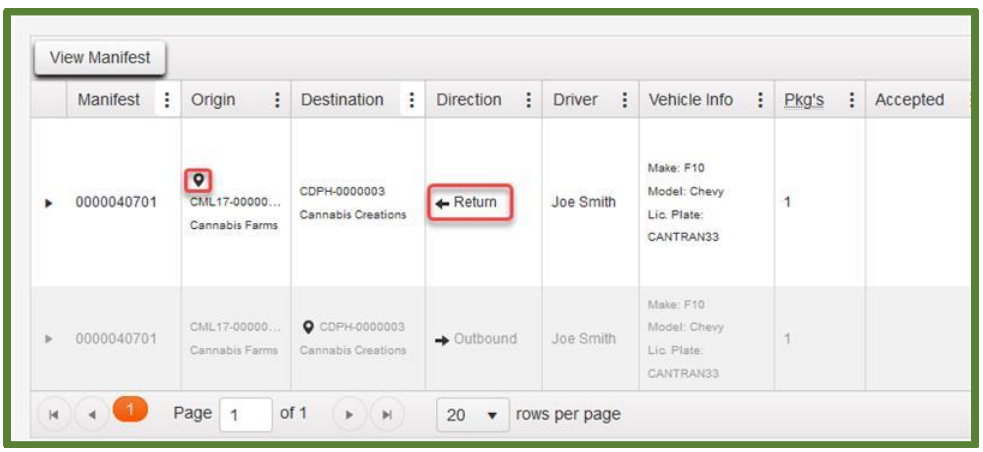


Figure 7: Transfers Hub Grid

Adult-Use Transfers

Existing medical facility licensees may transfer products from their medical facility inventory to their AU facility inventory.

Under Rule 40 of the Adult-Use Marijuana Establishments Emergency rules, the agency may authorize licensees who hold equivalent licenses to transfer marijuana products from the inventory of their marijuana facility to the inventory of their marijuana establishment. This applies if they hold marijuana grower/grower, marijuana processor/processor, or marijuana retailer/provisioning center equivalent licenses.

Rule 40(3) states that the agency shall publish a specific start date, end date, and other requirements for the transfer of marijuana products between equivalent licenses.

Beginning December 1, 2019:

1. Growers may transfer up to 50% of their harvest batch from their marijuana facility to their marijuana establishment. All products transferred must have passed test results in the statewide monitoring system.

2. Processors may transfer up to 50% of their finished product from their marijuana facility to their marijuana establishment. All product transferred must have passed test results in the statewide monitoring system.

3. Provisioning centers may transfer up to 50% of each product type (marijuana-infused product, marijuana concentrate, buds, etc.) that has been in inventory for a minimum of 30 days to their marijuana retailer. All products transferred must have passed test results entered in the statewide monitoring system.

These transfers are standard transfers and will not have a price associated with them. These transfers may only be made from a medical facility to an adult-use establishment with the same ownership. Medical facilities may not sell products to adult-use establishments.

Please see the following pages for all new transfer types that will be available for medical facilities, along with an example of creating and receiving a transfer from medical to AU as shown in **Figure 8**.

Adult-Use Transfer Types

Transfer Type	Facilities	Purpose
Grower to grower; medical to adult-use	Medical grower A, B, and C to adult-use growers A. B, and C of common ownership.	Growers may transfer up to 50% of their harvest batch from their marijuana facility to their marijuana establishment. All product transferred must have passed test results in the statewide monitoring system.
Processor to processor; medical to adult-use	Medical processor to adult-use processor of common ownership.	Processors may transfer up to 50% of their finished product from their marijuana facility to their marijuana establishment. All product transferred must have passed test results in the statewide monitoring system.
Provisioning center to retailer; medical to adult-use	Medical provisioning center to adult-use retailers of common ownership.	Provisioning centers may transfer up to 50% of each product type (marijuana infused product, concentrate, buds, etc.) that has been in inventory for a minimum of 30 days to their marijuana retailer. All product transferred must have passed test results in the statewide monitoring system.
Microbusiness Transfer	Medical grower A, B, and C to adult-use microbusiness.	Growers may transfer packages of immature plants to Microbusiness licensees. This transfer will have a wholesale dollar amount associated with it.

Immature plants; medical to adult-use	Medical grower A, B, and C to adult-use growers A, B, and C.	Growers may transfer packages of immature plants to equivalent adult-use licensees.

Figure 8: Adult Use Transfer Types

Beginning December 1, 2019, medical facilities will see the new transfer types below for selection:

Transferring Packages from Medical Facilities

The following is a step-by-step example of how a medical grow facility would transfer a package to an adult-use Grow Facility.

1. Navigate to the Transfers area for the medical licensed facility on the navigational toolbar as shown in **Figure 9**.

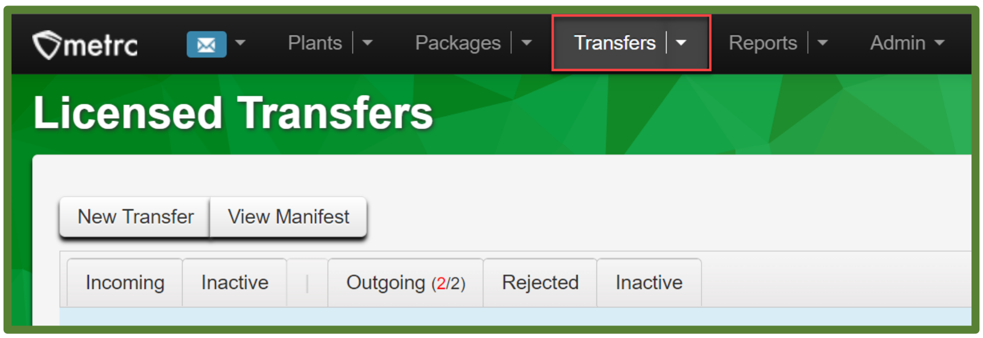


Figure 9: Transfers Area Menu

2. Click New Transfer button as shown in **Figure 10**.

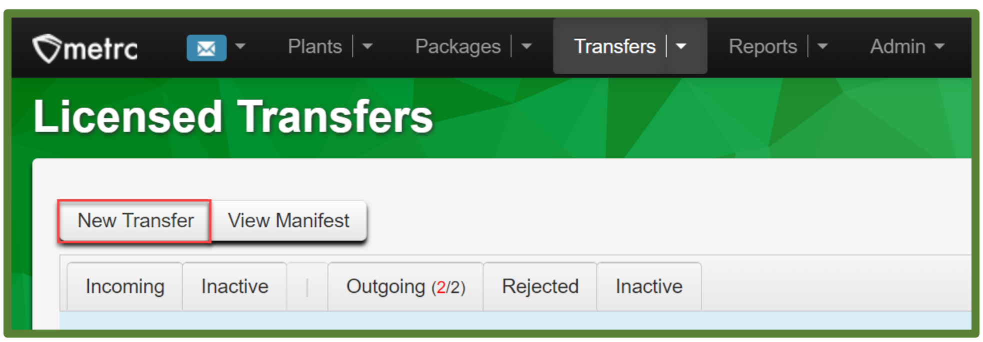


Figure 10: New Transfer Button

3. This will open the New Licensed Transfer action window to select a Destination license number with the same owners as shown in **Figure 11** below.

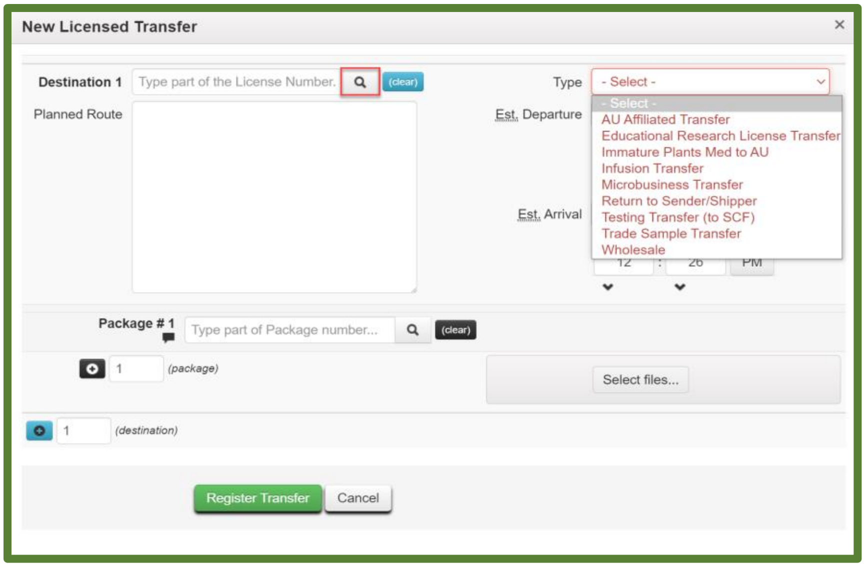


Figure 11: New Licensed Transfer Action Window

4. Select the corresponding affiliate adult-use Establishment to which the product is being transferred the product as shown in **Figure 12**.

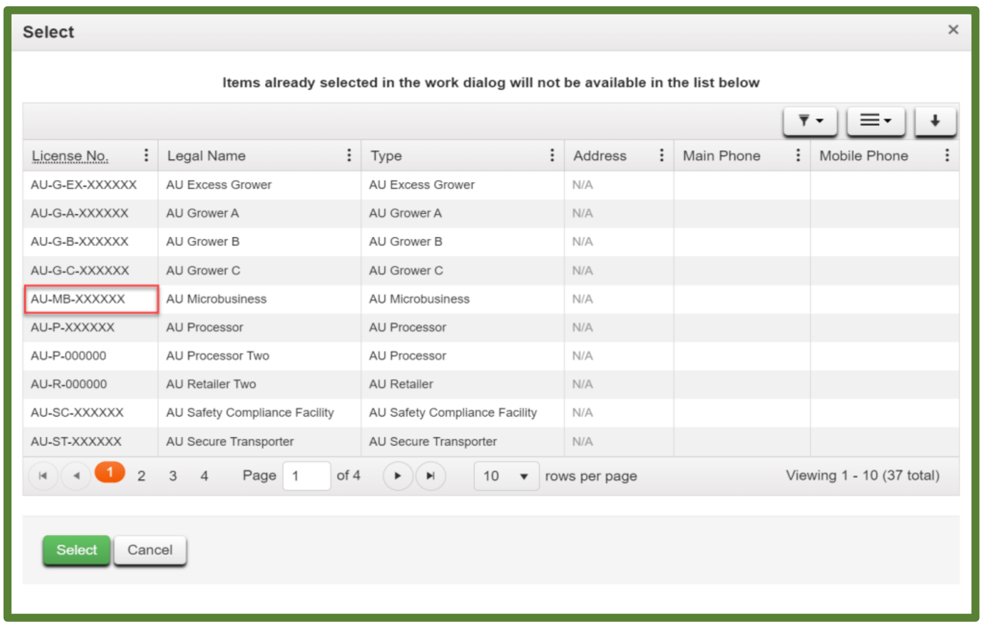


Figure 12: Select A Transfer Destination

5. Select the type of transfer (e.g., Grow to Grow Med to AU) as shown in **Figure 13** below.

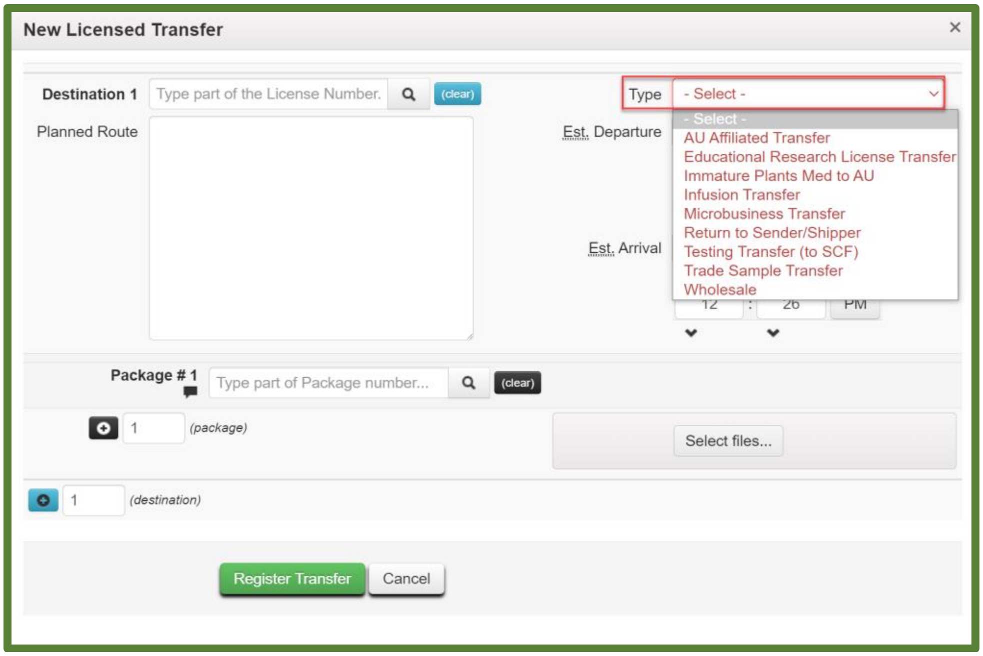


Figure 13: Licensed Transfer Type

Please note that the Grow-to-Grow Med to AU transfers are for all non-immature plant packages. If it is intended to transfer Immature Plants, select the Immature Plants Med to AU transfer type.

6. Complete the transfer form with Planned Route, Est Departure, Arrival, and Transporter Information as shown in **Figure 14**.

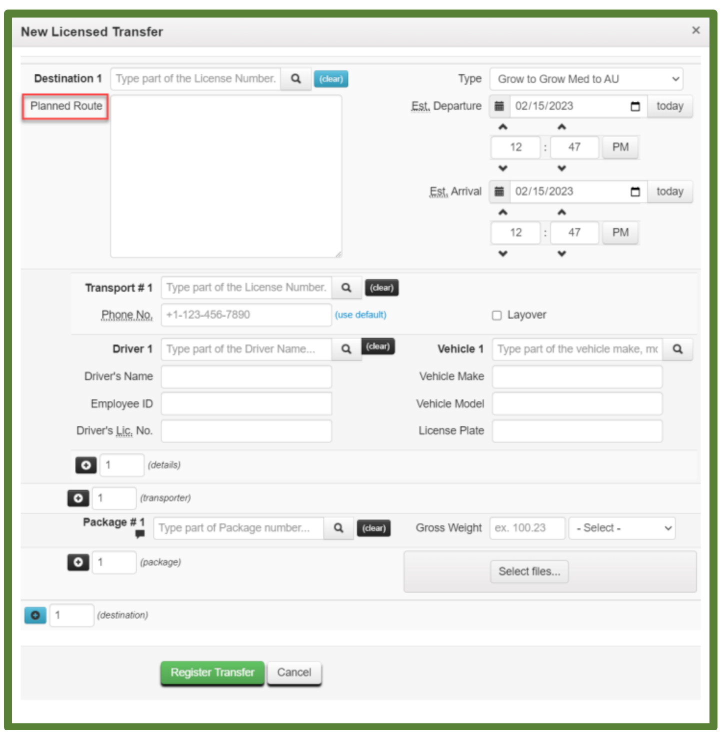


Figure 14: Licensed Transfer Planned Route

7. Look up the Package(s) that will be transferred using the magnifying glass as shown in **Figure 15** below.

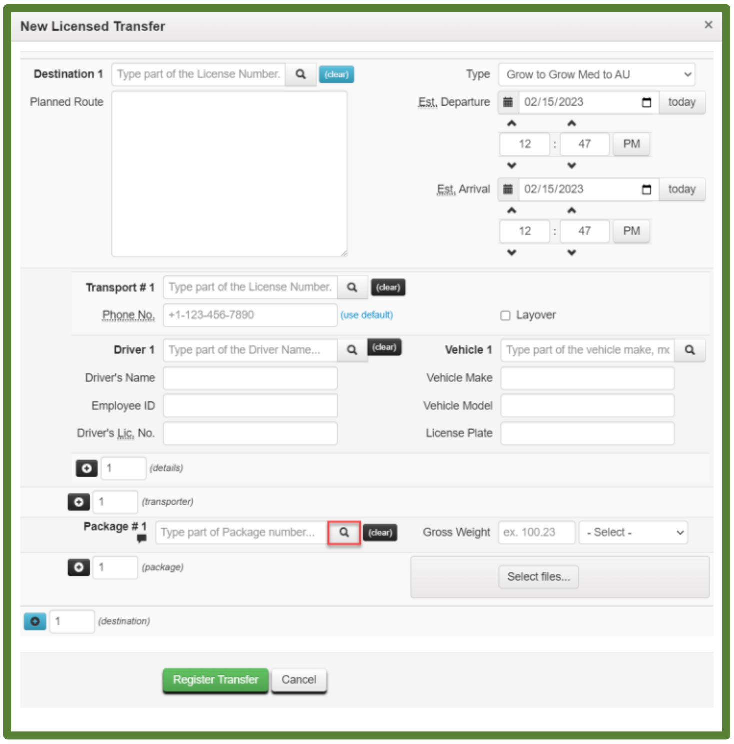


Figure 15: Package #1 Lookup

8. Select the Package(s) to be transferred as shown in **Figure 16**.

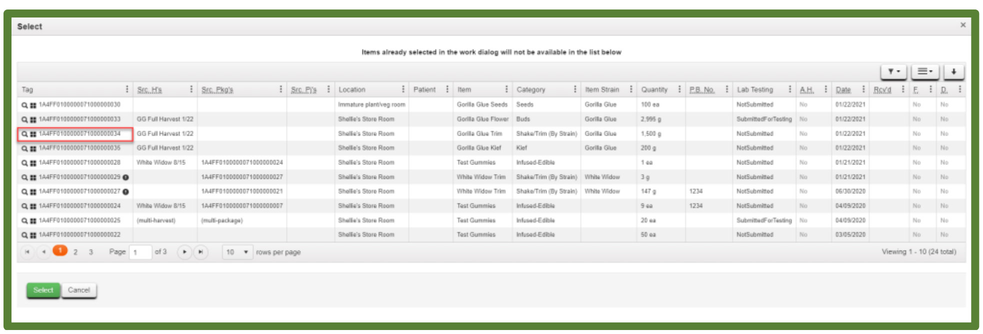


Figure 16: Select A Package To Transfer

9. Enter the Destination Gross Weight (the weight of the package, including its packaging and shipping containers) as shown in **Figure 17** below.

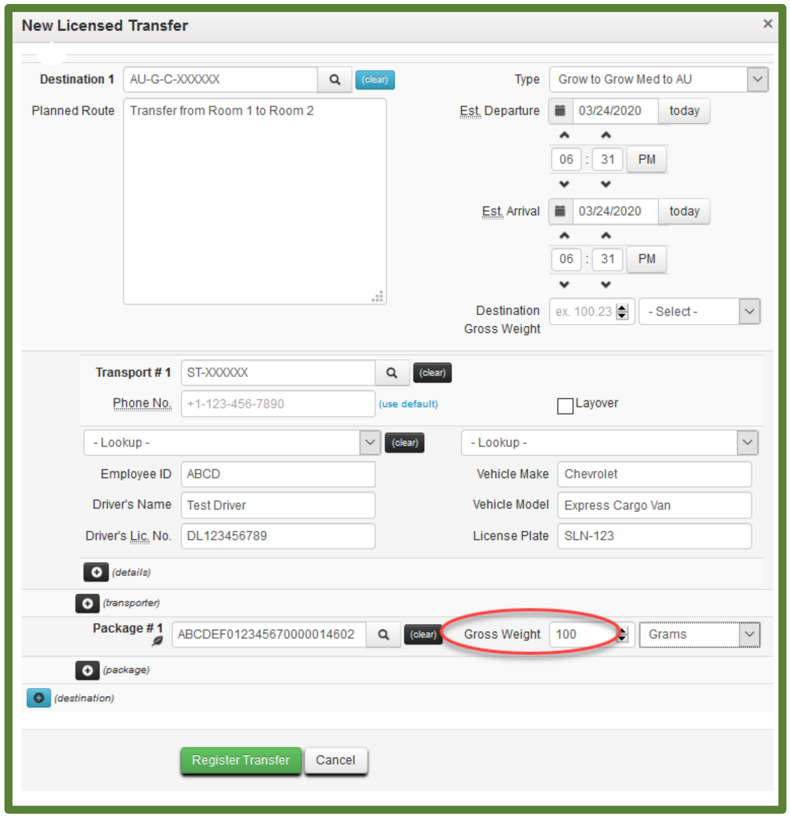


Figure 17: Gross Weight

10. Select the Register Transfer button after verifying all information to be accurate as shown in **Figure 18** below.

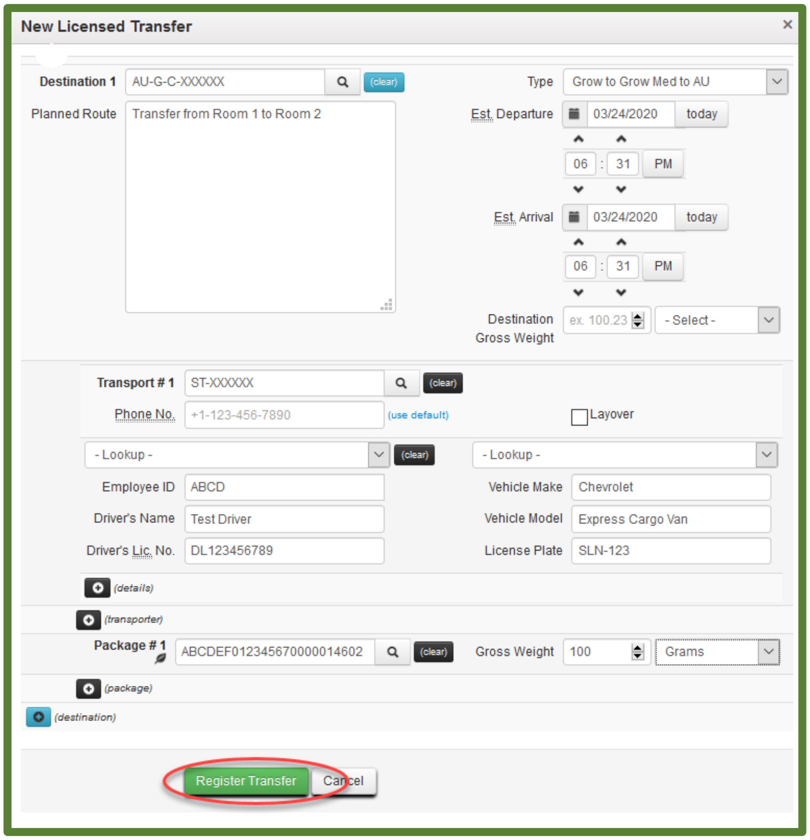


Figure 18: Register Transfer

Receiving the Package from the Medical Facilty

The following is a step-by-step example of how an adult-use Grow Facility would receive a transfer package from their medical grower facility. Medical products will have the yellow Metrc package label when transferred. After the package has been accepted into the AU establishment's inventory, a new package will need to be created. This new package will have the blue adult-use inventory Metrc package label.

1. Select the adult-use establishment to which the product was transferred as shown in **Figure 19** below.

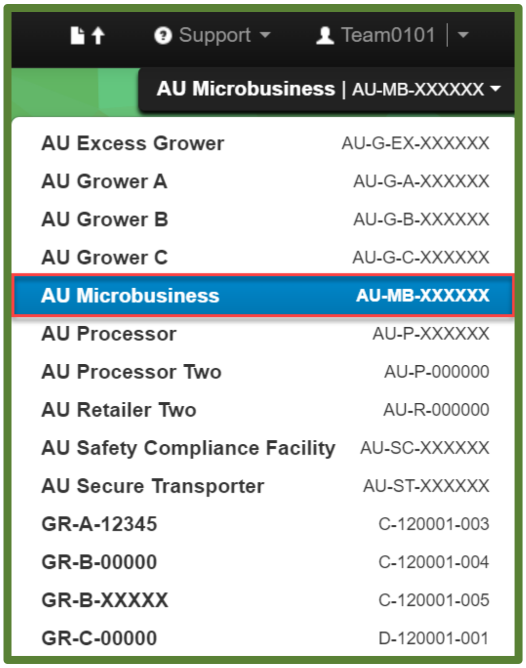


Figure 19: Select An Adult-Use Establishment

2. Click the Transfers menu as shown in **Figure 20**.

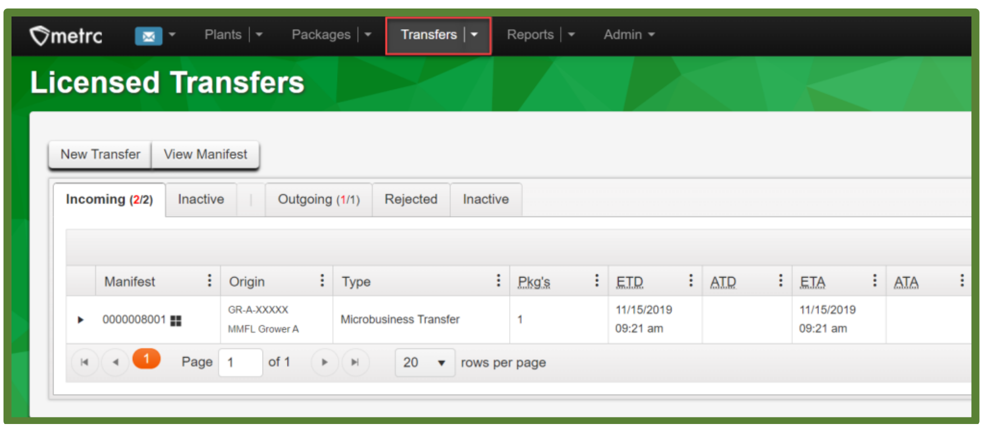


Figure 20: Licensed Transfers

3. Click the Receive button as shown in **Figure 21**.

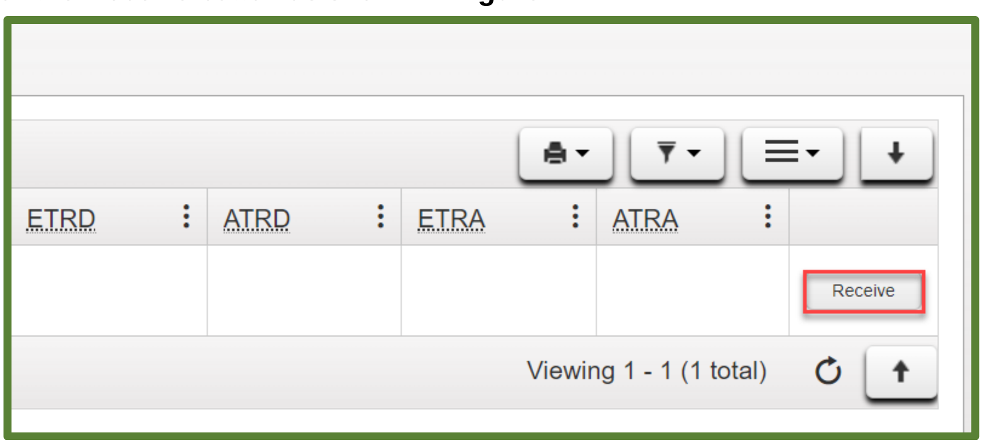


Figure 21: Receive

4. Select the location for the package as shown in **Figure 22**.

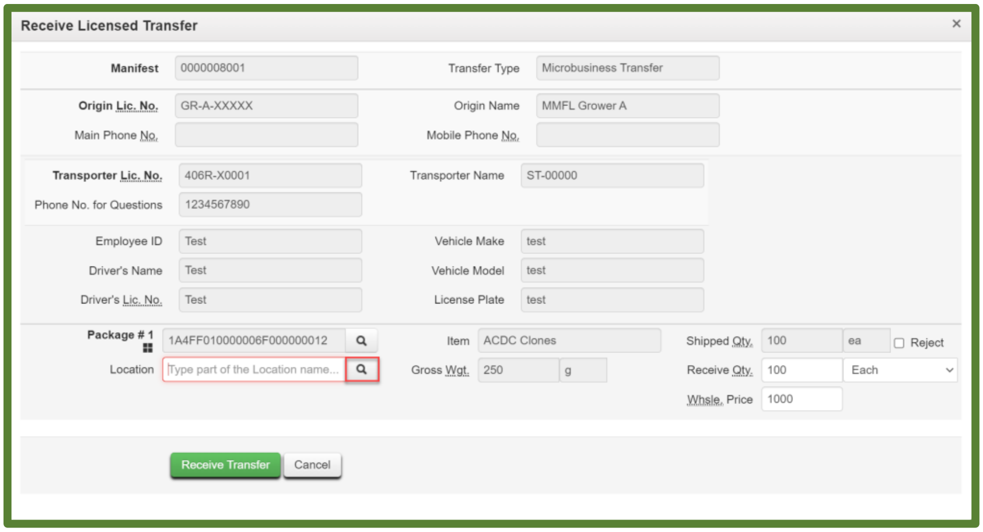


Figure 22: Package #1 Location Lookup

5. Receive the transfer as shown in **Figure 23**.

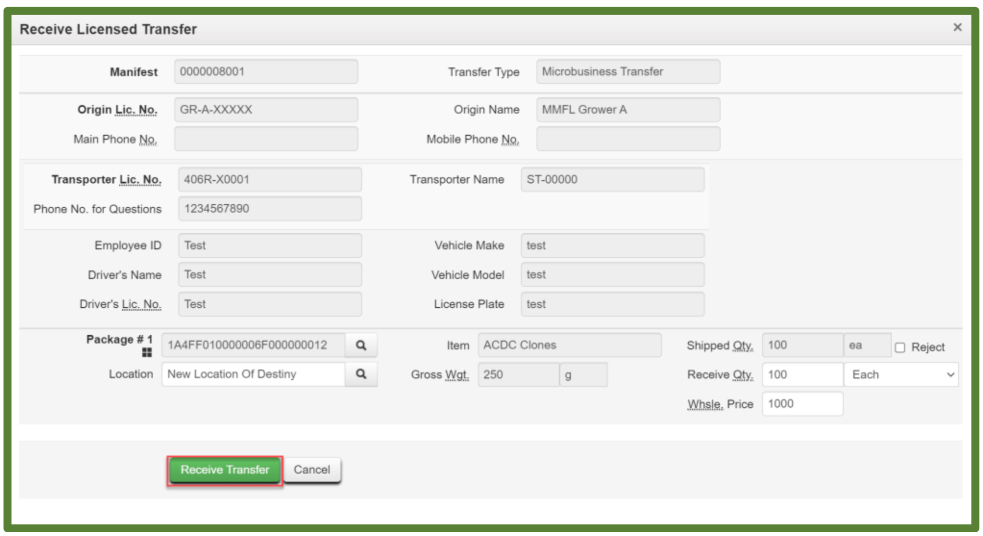


Figure 23: Receive Licensed Transfer

6. Click the Packages menu as shown in **Figure 24**.

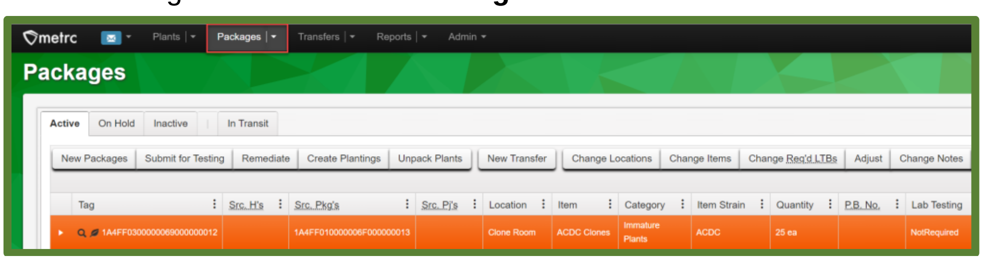


Figure 24: Packages Area Menu

7. Select the newly transferred package and then click New Package. as shown in **Figure 25.**

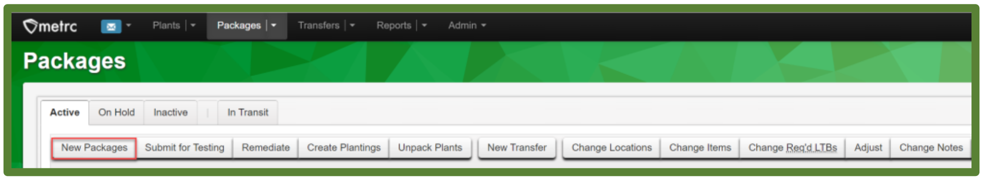


Figure 25: New Packages

8. Click the magnifying glass next to the New Tag field as shown in **Figure 26**.

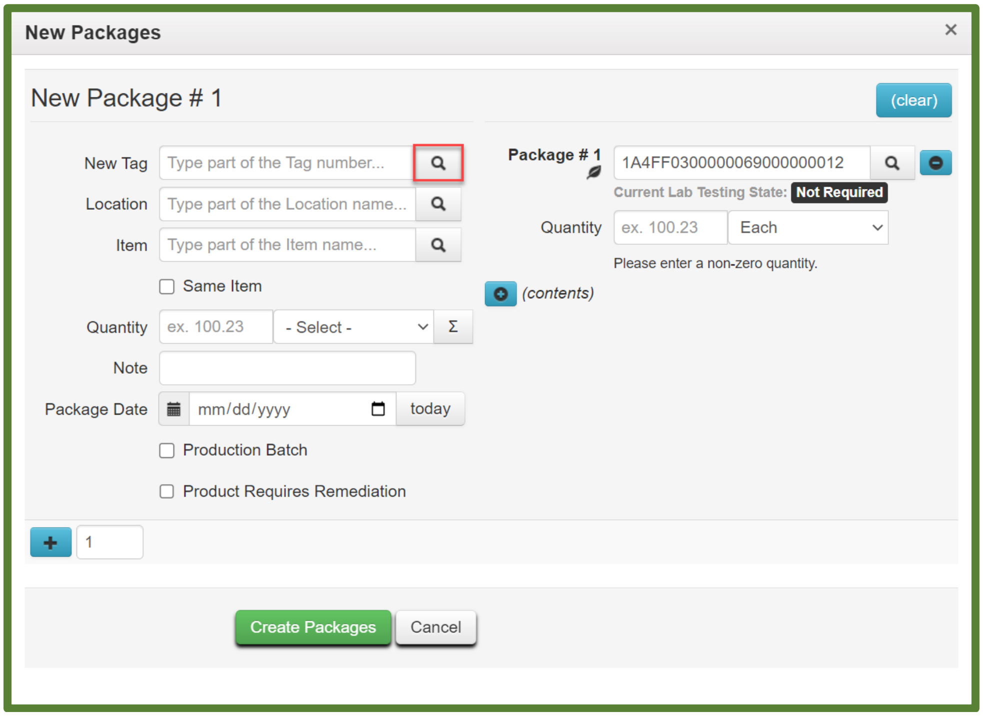


Figure 26: New Tag

9. Select a tag for the package that is assigned to the adult-use license as shown in **Figure 27** below.

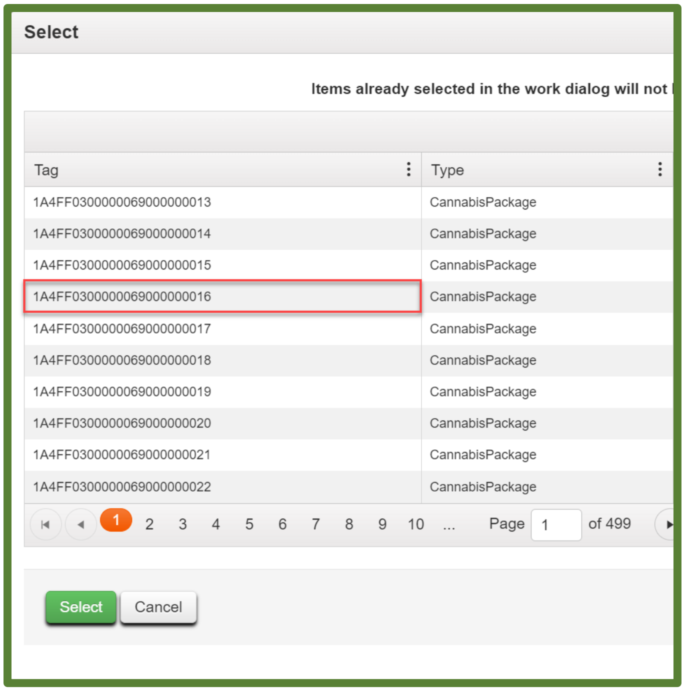


Figure 27: Select A Tag

10. Complete the New Package form as shown in **Figure 28**.

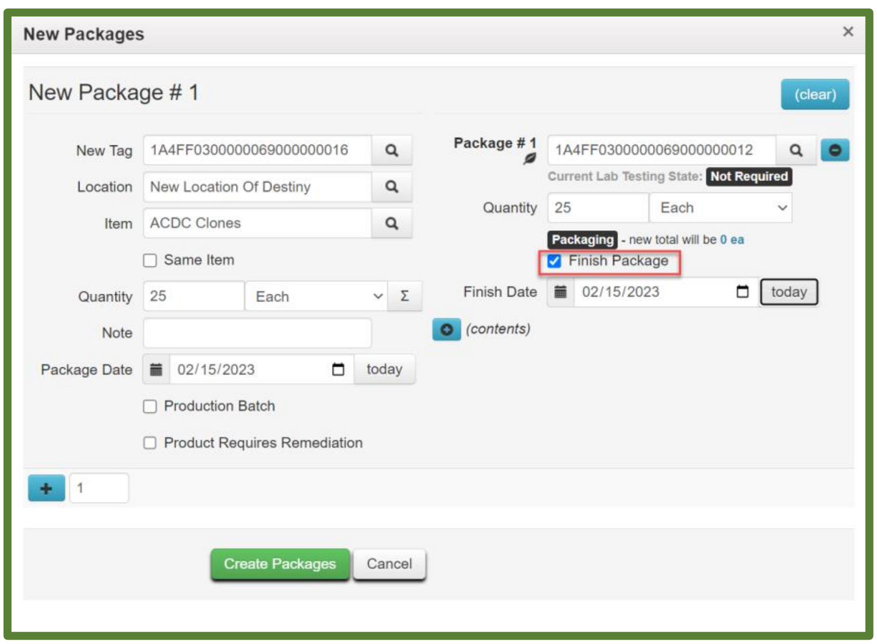


Figure 28: Check The Finish Package Box

(Verify that the entire weight of the package is used and check the Finish Package box.).

11. Select the Create Packages button after verifying the accuracy of all of the information as shown in **Figure 29** below.

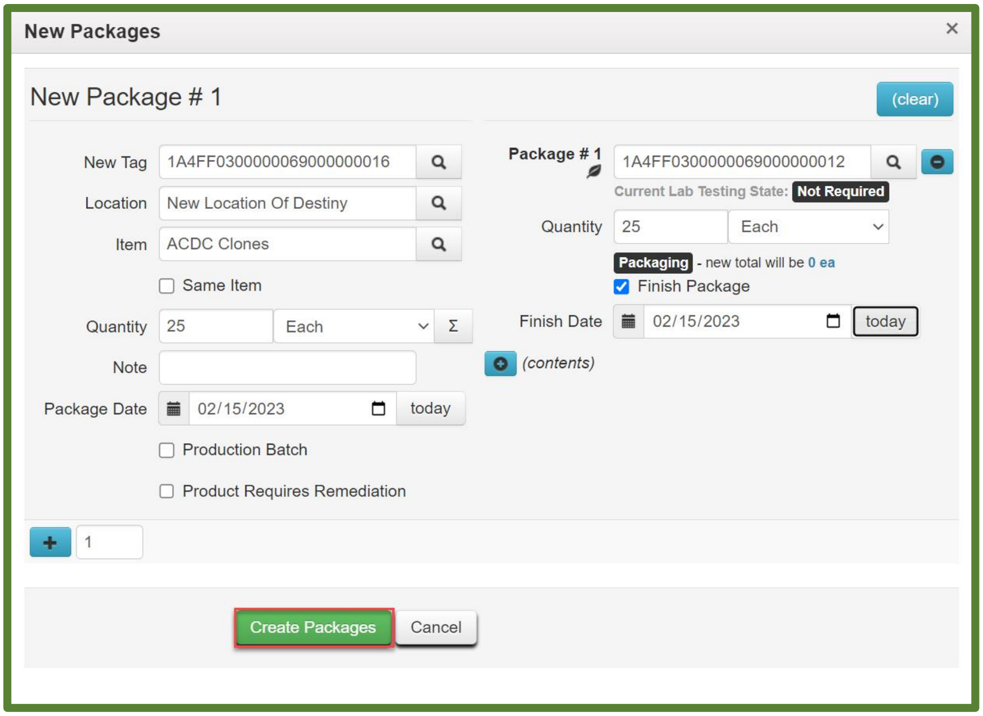


Figure 29: New Package Entry

All adult-use inventory must be designated with an adult-use inventory plant or package tag. The new adult-use package must appear under the Active Packages tab, and the package with the medical tag must be moved to the Inactive Packages tab.

Sales Deliveries

The Deliveries grid is located under the Sales area menu on the navigational toolbar as shown in **Figure 30**. Dispensary employees with the Manage Sales Deliveries permission will have the ability to create and complete sales deliveries to qualifying patients.

In Metrc, sales deliveries are reported differently than in-store sales receipts. Reporting a sales delivery as an in-store sales receipt in Metrc will not meet the regulatory requirements and may cause a sale to be reported twice. To differentiate between the two:

- Sales receipts would indicate the transaction took place in the licensed premises of the medical facility.
- Sales delivery would indicate active inventory was taken off the facility's licensed premises and delivered to a patient.
- All medical marijuana stores must never record the same transaction as a sales receipt and a delivery.

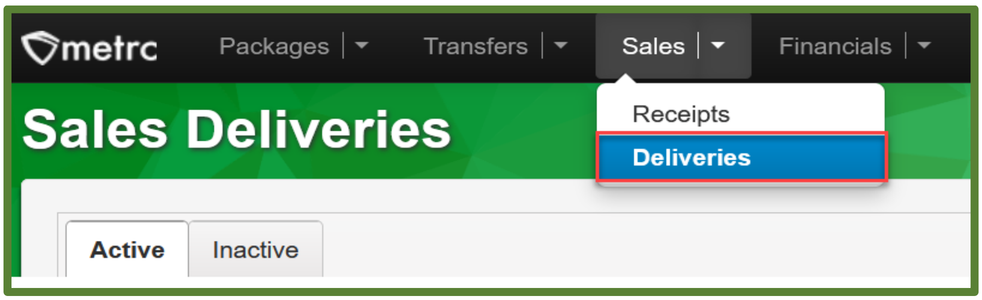


Figure 30: Sales Deliveries

The active tab for sales deliveries in Metrc is captured with the following area menus as shown in **Figure 31**.

Figure 31: Sales Deliveries

Item 1: Record Deliveries
Click Record Deliveries to create a sales delivery manifest to a consumer or patient's home.

Item 2: Edit Deliveries
The Edit Deliveries button will allow the user to edit an existing delivery manifest. This will allow the user to edit anything on the delivery manifest.

Item 3: View Manifest
View Manifest button will allow the user to view and print a manifest. The manifest must first be highlighted before selecting the button view manifest.

Item 4: Delivery
The Delivery column displays the delivery manifest number associated with the home delivery manifest.

Item 5: Transporter
The Transporter column lists the driver and vehicle being used to deliver the product.

Item 6: Sales

The Sales column displays the date and time the delivery manifest was created, and also this will determine the estimated time of departure.

Item 7: Customer Type

The Customer Type column displays whether the delivery manifest is/was for a consumer or patient.

Item 8: Patient

The Patient column displays the patient number if the delivery manifest is set up for patient delivery. If it is set up for a consumer, this column will be blank.

Item 9: Driver

The Driver column displays who the driver is/was for that delivery manifest.

Item 10: Vehicle Info

The Vehicle Info column displays the vehicle information for the delivery manifest.

Item 11: ETD

The ETD column displays the estimated time of departure for the delivery manifest. This is created when the delivery manifest is generated.

Item 12: ETA

The ETA column displays the estimated time of arrival for the delivery manifest.

Item 13: AA

The AA column displays the actual time of arrival of the delivery manifest. This will be populated when completing the delivery manifest.

Item 14: Completed

The Completed column displays the date and time that the complete button was selected in Metrc.

Item 15: Packages

The Packages column displays how many packages are on the delivery manifest.

Item 16: Total

The Total column displays the total amount charged to the consumer or patient.

Item 17: Recorded

The Recorded column shows when the sales delivery was created and is considered open in Metrc.

Item 18: State

The State column displays what state the delivery manifest is in, either shipped, completed, or voided.

Item 19: Void

The Void button would allow the user to void the delivery manifest if it was unsuccessful.

Item 20: Complete

After the sales delivery is finished, click the Complete button. Deliveries cannot be edited after the Complete button has been selected.

Sales Deliveries: Manifest

Just like a transfer manifest is created in Metrc, a sales delivery manifest is required to be created as soon as the order has been placed by the patient. When recording the necessary information in the sales delivery manifest, it is important to ensure the patient number accurately reflects the card number provided to the Provisioning Center. See the Record Deliveries action window in **Figure 32**.

Each delivery to a patient must be recorded separately. After the sales delivery is recorded, it is considered open in Metrc. If the delivery is still open, the employee can edit or void it as needed.

When a sales delivery is recorded in Metrc as Complete, the inventory is removed from the package and marked as a delivery. A sales receipt and a sales delivery must not be reported for the same transaction. This will cause inventory to be removed from the affected package twice.

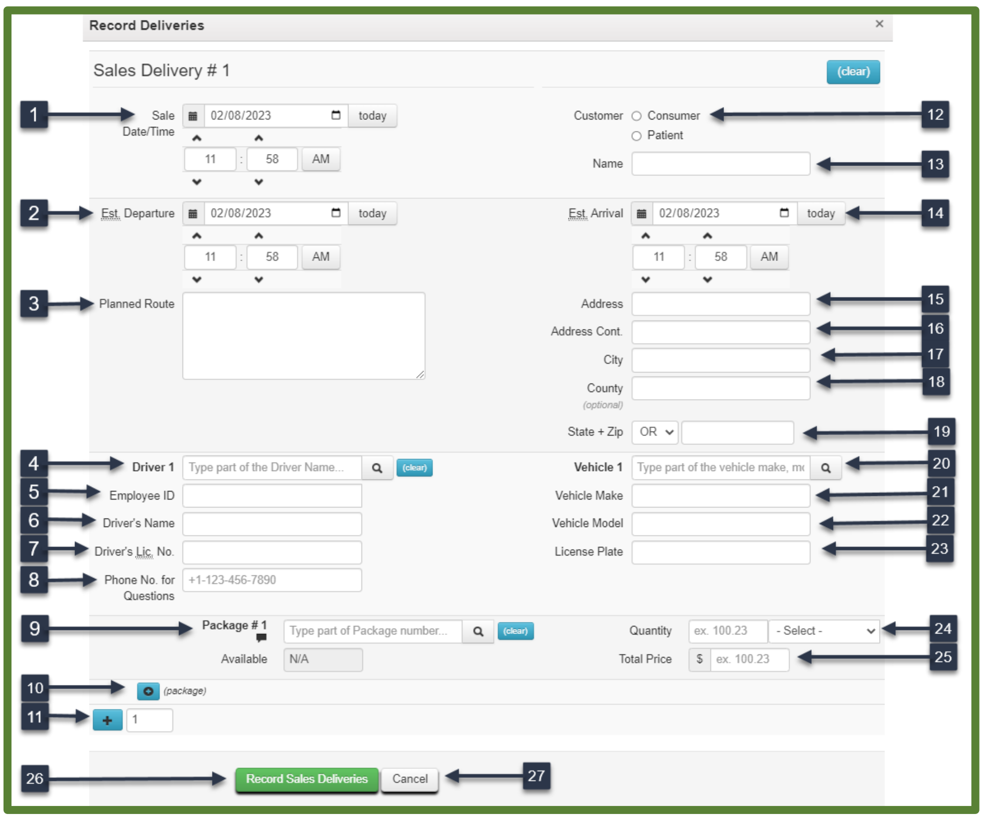


Figure 32: Sales Delivery Entry

Item 1: Sale Date/Time

The date of purchase from the receipt, including the time of sale in hours and minutes and whether the sale occurred in the A.M. or P.M. hours.

Item 2: Est. Departure

Use Est. Departure to provide the date and time the product is leaving the facility.

Item 3: Planned Route

The Planned Route field is used for each specific leg of a delivery. If the delivery is going from one location to another, only one route will need to be entered. If the delivery is a multipoint delivery, a field for each leg of the delivery will need to be completed. The field shown will only be for the individual leg of the delivery.

Item 4: Driver 1

The Driver 1 list will provide the user with a list of drivers that have previously been entered into Metrc. Every time a driver is entered for the first time, the information associated with that driver will be added for future use. The driver information includes Badge number/Handler's Permit or Username, Driver's Name, and Driver's Lic. No. But is not associated with the vehicle.

Item 5: Employee ID

Enter the username of the employee delivering the product.

Item 6: Drivers Name

Enter the first and last name of the employee delivering the product.

Item 7: Drivers Lic. No.

Enter the driver's license number of the employee delivering the product.

Item 8: Phone No. for Questions

Enter the best phone number for any questions related to the delivery.

Item 9: Package #1

Packages that are being delivered.

Item 10: Add Package

This will allow the user to add additional packages to the delivery.

Item 11: Add Delivery

This will allow the user to add additional deliveries.

Item 12: Customer

Identifies that the customer is a consumer or patient.

Item 13: Name (optional)

The optional name field is where the name of the customer may be entered.

Item 14: Est. Arrival

Use Est. Arrival to provide the date and time the product is arriving at the destination.

Item 15: Address

Enter the address to which the package is being delivered.

Item 16: Address Continued

If needed, this field is used to enter the address to which the package is being delivered**.**

Item 17: City

Enter the city to which the package is being delivered.

Item 18: County (optional)

Enter the county to which the package is being delivered.

Item 19: State + Zip

Enter the State + Zip to the package that is being delivered.

Item 20: Vehicle 1

The Vehicle 1 list will provide the user with a list of vehicles that have been previously entered into Metrc. Every time a vehicle is entered for the first time, the information associated with that vehicle will be added for future use. The vehicle information is not associated with the driver.

Item 21: Vehicle Make

Enter the make of the vehicle delivering the product.

Item 22: Vehicle Model

Enter the model of the vehicle delivering the product.

Item 23: License Plate

Enter the license plate number of the vehicle delivering the product.

Item 24: Quantity

How much product did the patient purchase from the identified packages. Select the unit of measure from the menu. The unit of measure must match the unit of measure of the source packages.

Item 25: Total Price

Enter the Total Price for the product sold before tax and after any discounts.

Item 26: Record Sales Deliveries

Click the Record Sales Deliveries button to save the information and exit.

Item 27: Cancel

Click to exit the without saving any changes.

Sales Deliveries: Recipient

Users with permission to conduct a sales delivery will see a Name box in the Record Deliveries dialog box. This name is supposed to indicate the individual who was the recipient of the delivery. When entered, this will populate on the sales delivery manifest as the Recipient Name as shown in **Figure 33** and **Figure 34**. The Patient No. field indicates the identification that was used to verify the patient.

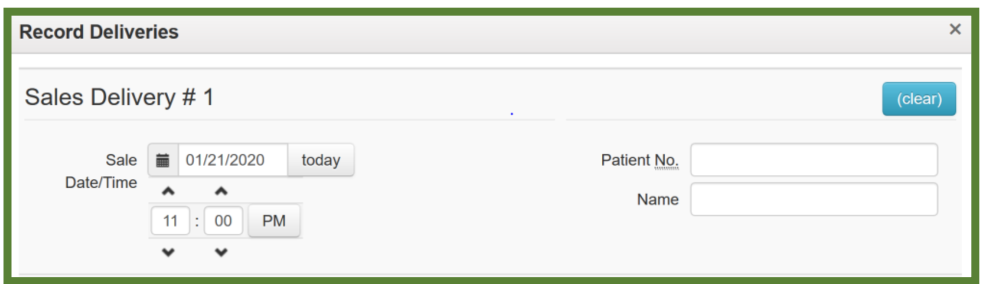


Figure 33: Sales Delivery #1 On The Record Deliveries Page

Recipient Name:		Patient No	X
Patient Registry Number:			
Delivery Notes: **details for deliveries that can not be completed**			

Figure 34: Sales Delivery Receipt

Sales Deliveries: API Impact

If a Provisioning Center plans to report sales deliveries through their point-of-sale system, there are a few considerations Metrc would like to note. The sales delivery manifest can only be printed in the active Metrc account. The Metrc API will allow for the creation/reporting of sales deliveries, but dispensaries must ensure the following:

- Confirm with the user's point-of-sale provider that sales deliveries are being reported into Metrc as deliveries and not receipts.
- Log into Metrc prior to departure and print out the Metrc sales delivery manifest.
- Do not create both a sales delivery in Metrc manually and in the point-of-sale system separately, as it will likely be recording the transaction twice.

Enabling Patient Adverse Response for Employees

Before recording adverse responses, Metrc administrators must give access to any employees who will be recording the adverse responses by selecting Employees on the Admin area menu as shown in **Figure 35**.

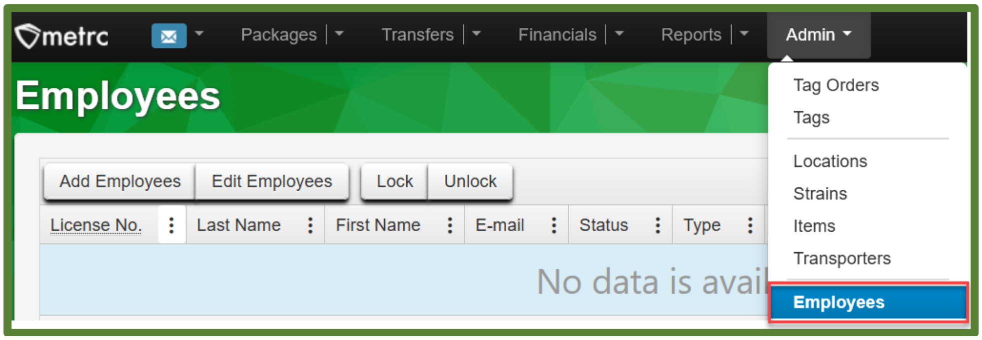


Figure 35: Select Employees

On the employees' grid, select the employee that would be recording the adverse responses, and click the Edit Employees button on the top of the grid as shown in **Figure 36**.

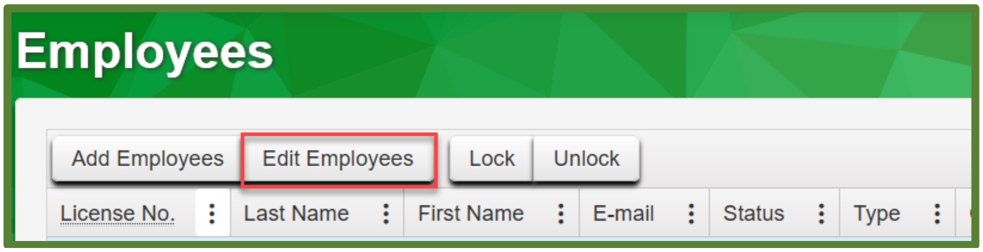


Figure 36: Edit Employees

In the Edit Employees action window, check the Manage box to the right of the Adverse Responses line as shown in **Figure 37**.

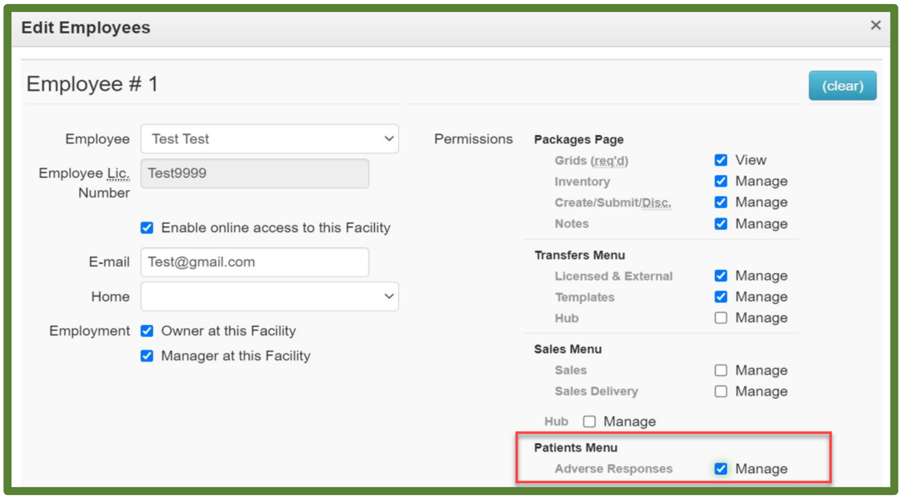


Figure 37: Check The Manage Box

Recording Adverse Responses

With consumer adverse responses enabled, select the Adverse Responses on the Sales area menu to open the Register Adverse Responses action window to record the consumer response as shown in **Figure 38**.

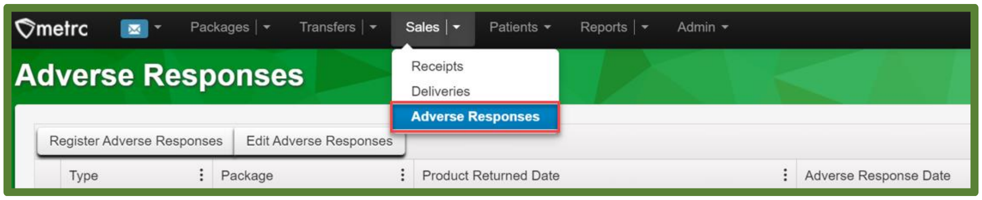


Figure 38: Select Adverse Responses

In the Register Adverse Responses action window, enter the consumer's receipt number in the dialogue box for Patient No., select the appropriate package and date information, and record the reported reaction (shortness of breath, bad taste, etc.) information in the Notes box as shown in **Figure 39**.

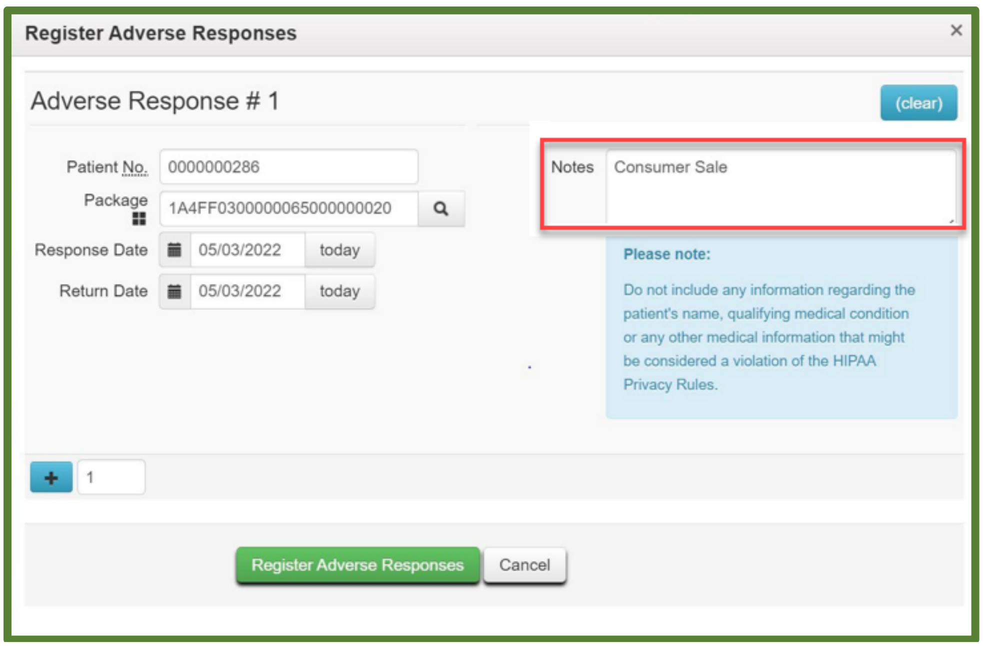


Figure 39: Adverse Response Notes

Metrc Training

Sign up for training through the Metrc website (www.metrc.com/partner/michigan/) or by selecting Sign Up For Training under the Support area menu on the navigational toolbar in the Metrc software.

To sign up from the Metrc account:

1. Click Support on the navigational toolbar.
2. Click Sign Up For Training.
3. On the new page, fill out the registration information.

To sign up from the Metrc website: https://www.metrc.com/partner/michigan/

- If a user is new to Metrc and has a license from the state: New Business Training
- If already active in Metrc and looking for additional training: Metrc Learn

Metrc Support Portal

The Support Portal is a portal that provides users with on-demand access to various resource materials, including past bulletins and helpful links. It is designed to be a supplemental resource to the Metrc Support team, providing options for self-assistance with documentation, a live-chat feature, and the ability to submit support tickets directly to the Metrc team. It is designed to provide licensees the ability to search and view Metrc-related content.

To access the portal, navigate to **Support.Metrc.com,** or from the Metrc System, click Support and navigate to support.metrc.com and it will redirect you to the portal as shown in **Figure 40**.

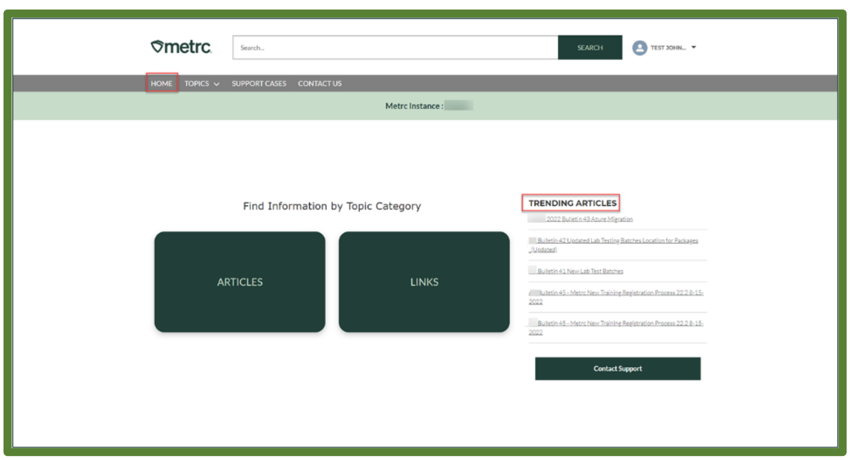


Figure 40: Support Portal

If a user is unable to find relevant material to assist them in their request, they can submit a support ticket directly from the top of the page. By using this button, the user will navigate to the contact area, where they can submit a case (formally known as a ticket) to support as shown in **Figure 41** below.

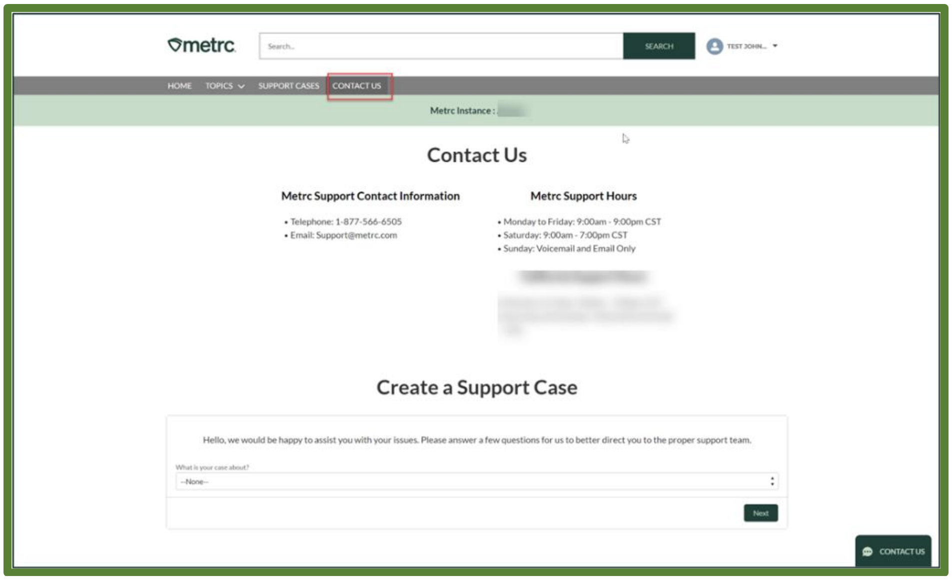


Figure 41: Submit A Request

Metrc Support Contact Information

Support Materials

- MI Supplemental Guide
- Metrc Manual/User Guide
- Metrc CSV Formatting Guide
- Metrc Industry Reports Guide

Interactive Support Team

- Email: support@metrc.com
- Phone: 877-566-6506
  Monday through Saturday: 8:00 A.M. – 10:00 P.M. Eastern
  Sundays: Voicemail and Email Only
- Chat: Log into http://support.metrc.com to access the chat feature
  Monday through Friday: 8:00 A.M. – 10:00 P.M. Eastern